

FIG. 1

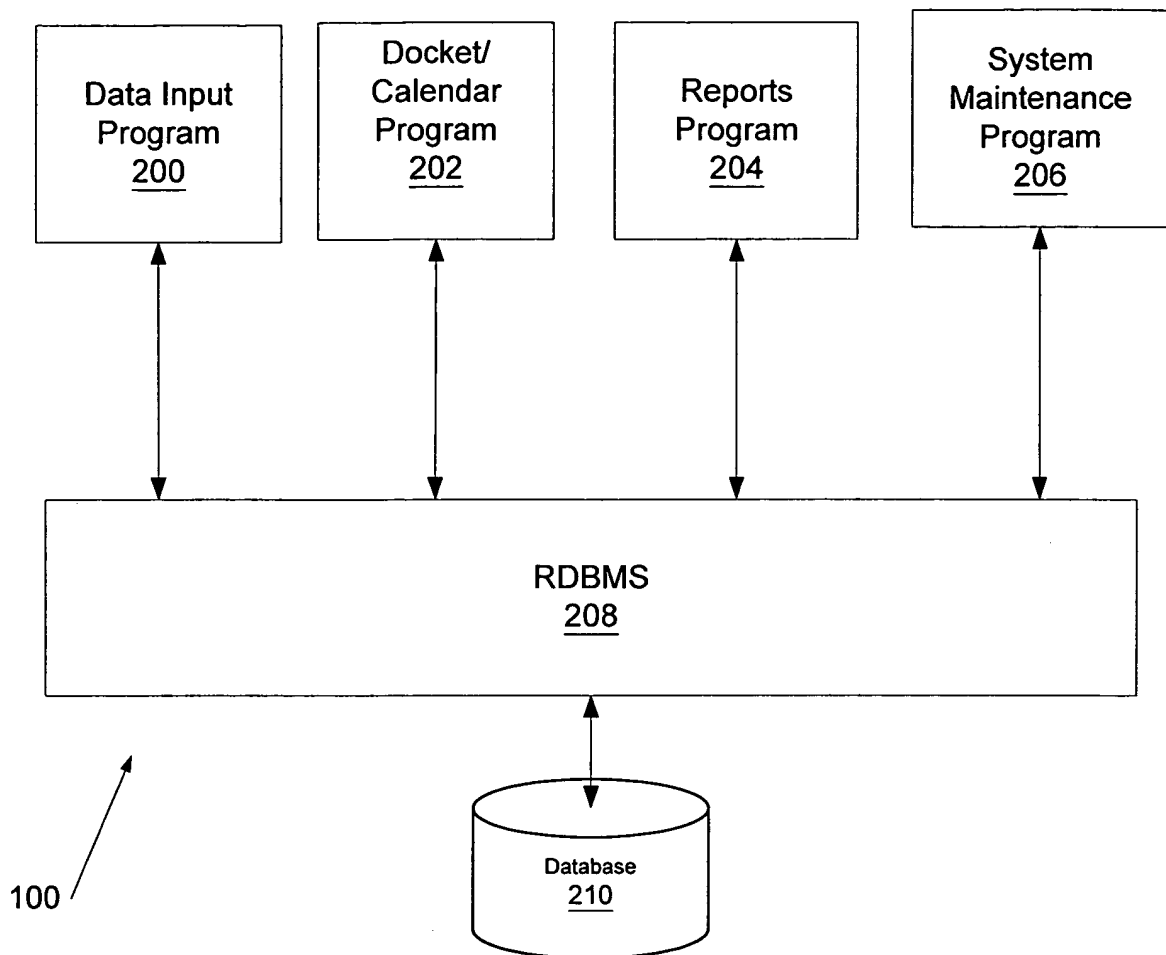


FIG. 2A

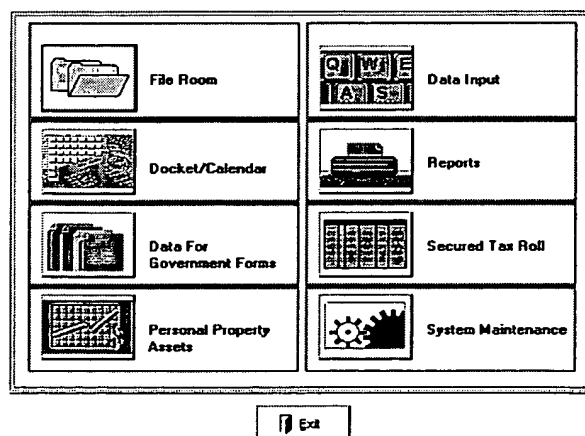


FIG. 2B Main Window

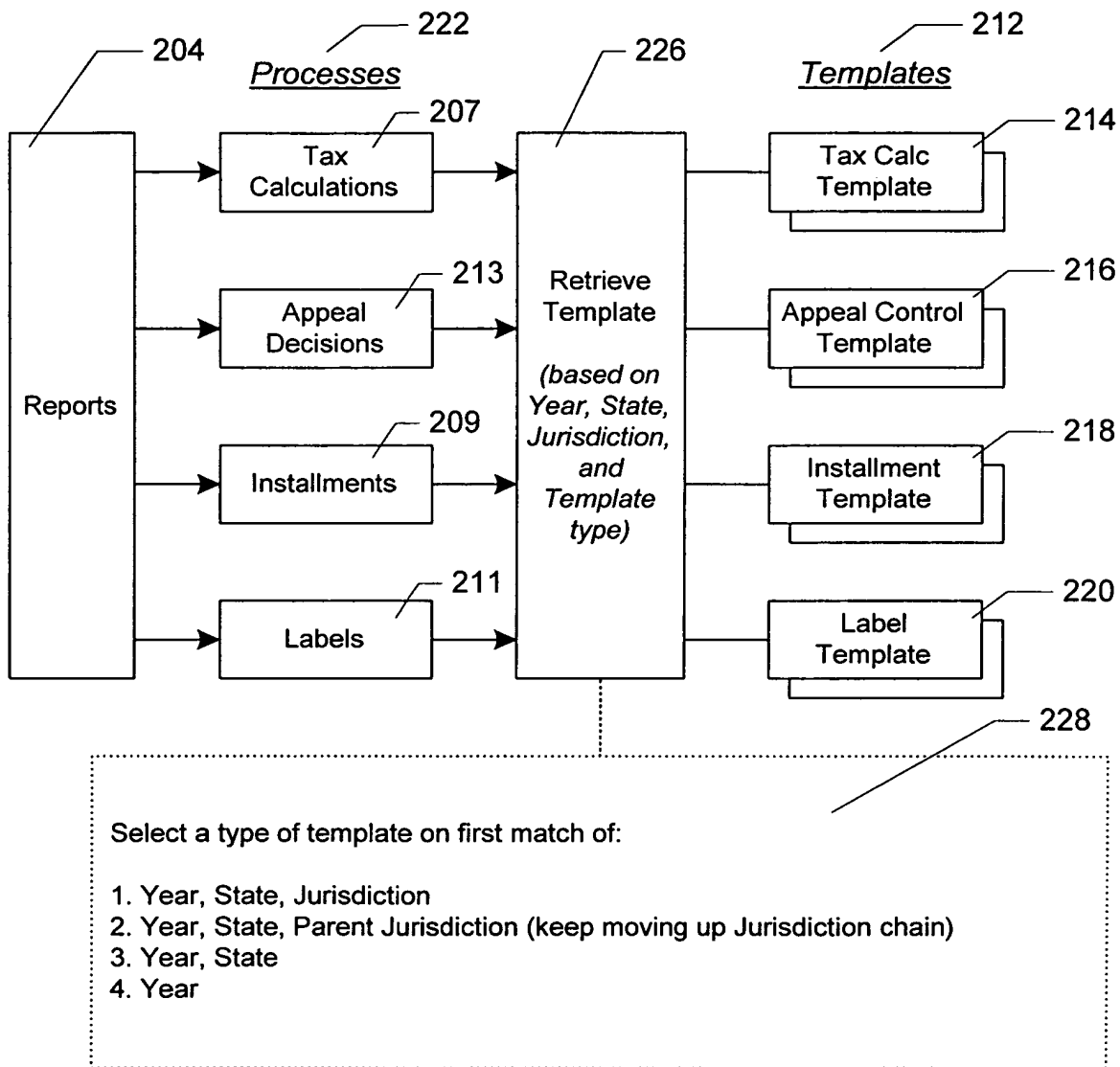


FIG. 3

FIG. 4 Parcel Record

FIG. 5 Calculate Tax

Figure 1 is a screenshot of a computer screen displaying a software interface for property assessment. The interface is divided into several sections. At the top, there's a header area with a title bar. Below it, the "Assessment Track" section contains a table with columns "Type" and "Track ID". To the right of this table are several input fields and checkboxes, including "Type: RE", "Track ID: 1", "Tax B#1: N25", "Tax B# Amt: 0.00", "Plug Tax Rate", "Projected", "This is a Portale Track", and "Include Assessment". The "Assessment Detail" section below features a table with columns: Subtype, FCV, Asd FCV, FCV Imp, FCV Land, Calc Tax Amount, and a "Change Order" button. The table shows data for "Interim" and "Projected" values. To the right of the table is a "Move Up" and "Move Down" button. At the bottom, there's a summary section with "Subtype: Interim", "Class: 5", and "Projected?" checkbox. Below this is a table with columns "Actual Value", "Land", and "Improvements", showing "FCV", "Asd FCV", and "LPV" values and their respective ratios.

[illegible]

296 298 284 294

Appeal Billing

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PP1	No		
A REAL	11	No	No	

A Tracks With Appeal Activity

Appeal Record

Appeal #: File #: Billing#: Date Created: 12/28/98

Appeal Ref: Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons: Status:

Responsible Professional:  ☒ Allocated?

Working Professional:

Consultant:  ☐ Consultant Engaged

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

300

FIG. 8 Appeal Record

296 298 302

Appeal Billing

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Billing Information

Fee Agreement #1		Fee Agreement #2		Fee Agreement #3	
Billing Type	Final Amount	Billing Type	Final Amount	Billing Type	Final Amount
Contingency <input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat <input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly <input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:		Form:		Form:	

☐ Multiple Years Final Year:

Referral

Firm:  Contact:

☒ Contingency ☐ Flat Fee Amount:  0.00

304

FIG. 9 Appeal Billing

### A Tracks Currently Under Appeal

[illegible]

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbsdlgsrfg
000-00-0006	Pat's Property	Just a really big property

Switch To Subparcel..

Parcel

FIG. 11 Subparcels

310

Budget Name:  Default

NAV Only no

Personal Only no

Real Only yes

Sup Only no

312

Budget Name:

Date Saved:  Time Saved: 4:54 pm

Saved By:  ☐ Combined Property

Annual Increase Rates

FCV Increase:  FCV Rate Increase:

LPV Increase:  LPV Rate Increase:

Other Parameters

Years To Forecast:  ☐ Entire Property

Equalization Ratio:  ☐ Track Installments

Budget On This Track Type

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

Notes:

332

334

336

Open Budget

Select Default Budget

Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.

308

314

316

320

318

324

326

322

328

FIG. 12 Create Budgets

338

Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID:

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00
2004	114,869	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show:

☒ Tax From 1997

☐ Installments Due in 1997

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

340

342

344

346

FIG. 13 Budget Worksheet



348

ID	Required Date	Payee	Asmt Type	Track ID	Tax Bkt	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP35163135165165	25,000.00	0.00	25,000.00	07/01/97
2	01/03/97	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	07/01/97
3	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types: ☒ Real ☐ Supplemental ☐ Personal Property ☐ NAV Track ID: 1

Installment: 0 ☐ Estimate? Payee: AZ-MARICOPA-T

Tax Bkt: ? Chk Req #: 0 Check Num: 0

Chrg Less Disc: 130,929.60  
Payments: 130,929.60  
Balance to Pay: 0.00  
Unpaid Amt: 0.00

Charges Discount Payments

Date: Principal: 0.00 Discount: 0.00 Payments: 0.00 Status: Released

Penalty: 0.00 Auto Add

Interest: 0.00 Entry Date:

Notes Other: 0.00 Mailed Date:

350

FIG. 14 Accounts Payable

352

**Auto Add**

A/P Entries

☒ Divide into Installments

☒ Include Discounts

☒ Include Payments

☐ Skip Tracks Already Brought Over

OK

Cancel

Track Types

☒ Real ☐ Supplemental ☒ Personal ☐ NAV

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

This jurisdiction is getting its rules from:

Arizona (Real)

Arizona (Personal)

FIG. 15 Auto Add

Figure 1 is a screenshot of a computer screen displaying a software interface for managing client information. The interface is divided into several sections:

- Client List (260):** A table with columns for Client ID, Name, and Active?. It lists several clients, including 2802 (HUNTERS/GLEN APARTMENTS), 2803 (UBERTY/UP), 2804 (FIRST UNION/REAL ESTATE/EQUIT), 2805 (RONISHORE), 2806 (BANK ONE/CHICAGO), 3040 (3040 North 44th Street Partners), 777NVE (777 Investments LLC), and 9998 (Ashley Eleanor Merritt).
- Client Details (360, 362):** A detailed view of a specific client (Client ID: 9998, Ashley Eleanor Merritt). It includes fields for Client Name, Client #, Billing #, Type, SubType, Responsible Attorney, Address, Mailing Address, City, State, Zip, E-Mail Address, Phone, Fax, Parent ID, Referral ID, Referring Individual, and Referral Terms. There is also a 'Contacts' button.
- Notes (364):** A section for adding and viewing notes related to the client.
- Search (354):** A search bar at the top right of the interface.
- Buttons (356):** A button labeled 'Contacts' located near the client details.

Figure 1 is a screenshot of a software window titled "Contact Maintenance". The window contains a table with two columns: "Indy ID" and "Full Name". The first row of the table shows "1" under "Indy ID" and "Jackie G. Quinn" under "Full Name". To the right of the table is a toolbar with icons for adding, deleting, and other actions. Below the table is a form with various input fields and a dropdown menu. The form includes fields for "Individual ID", "Contact Type" (set to "Accounts Payable"), "Full Name", "Title", "First Name", "Last Name", "Salutation", "Phone" (set to "Business"), "Ext.", "Address is Same as Client" (checkbox), "Address 1", "Address 2", "Address 3", "City", "State", "ZIP", and "E-Mail".

Callout numbers point to specific elements:

- 370: Points to the window title bar.
- 372: Points to the "Indy ID" column header.
- 454: Points to the "Full Name" column header.
- 452: Points to the first row of the table.
- 456: Points to the toolbar.
- 490: Points to the "E-Mail" field.

Referrals for Ashley Eleanor Merritt

Effective Date	Type	Active	Amount	Comments

Type: Flat Amount: 10.00 Effective Date: 07/06/1998

Comments: This is a really big referral fee.

☒ Set As Active Active: no

OK ? Help

FIG. 18 Referral

Individual Id	Name	Title	Number
MKP	Mikhail Krashov Pereski	Attorney	9999
MSK	Miya S. Krashov	Attorney	9999
PII	Patti Naccarati	Attorney	9999
RDN	Richard D. Naccarati	Attorney	9999
RDN1	R. Naccarati	Attorney	9999
RJT	Rich J. Tully	Attorney	9999
WIS	William S. Wills	Attorney	9999
WS	William S. Wills	Attorney	9999

Individual Id: AEM Title: Little Lawyer

Name: Ashley Eleanor Merritt

Number: 9999 Attorney: N

FIG. 19 Working Professionals

L: Docket and Calendar

Calendar Docket Entry

Event Information For 07/01/98

Date	Time	Event Type	Event	Property Info	Comments
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	

Year: 1998 Jul

Show: ☐ Current Property Only ☒ All Events

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Year: ST: Jurisdiction: Parcel #: Appeal #: Case Ref: Appeal Level: Hearing: Individuals:

Default Information

Enter values in these fields to set defaults only. Property-specific information will only be used if "Show: Current Property Only" is selected or if property-specific docket entries are created.

Year: 1997 State: AZ Juris Code: Mar

Parcel: 100-02-9993 Prop Name: Patti Naccarati Client: NACCARATI

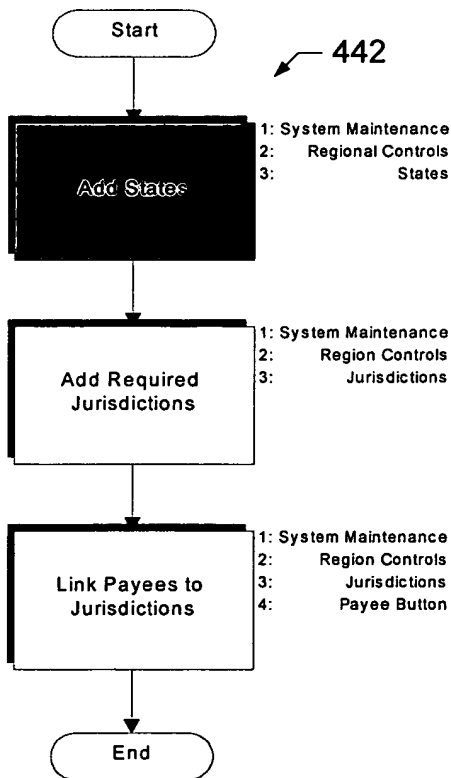
Appeal #: 9999 Appeal Ref: Ashley big appeal

ACTIVE / Level 1

FIG. 20 Calendar

**FIG. 21 Docket Entry**

The interface shows a table of docket entries with columns: Date, Time, Type, and Event Code. The table contains several entries, including 'Appeal Process' and 'HEARING'. To the right of the table is a search filter with checkboxes for 'Show Dockets for Current Property Only' and 'Show Only Dockets of Type: Assessment'. Below the table is a details pane with fields for 'Type: Appeal Process', 'Event: Appeal Process', 'Date: 07/12/1998', 'Time: 12:00 PM', 'Appeal Level: 1', 'Hearing: 1', 'State: Jurisdiction:'. There is also a section for 'Individuals Involved' with a list of names and an 'Edit List' button. A 'Comments' text area is at the bottom of the details pane. The bottom of the interface shows 'Default Information' with fields for 'Year: 1997', 'State: AZ', 'Jurisdiction: Mar', 'Mancopa', 'Client: 7', and 'Default Settings'.



**FIG. 23 State Set Up**

The interface shows a table of states with columns 'Abbreviation' and 'State'. The table contains the following data:

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

Below the table is a section for 'State Code' and 'State' with the following values: State Code: AK, State: Alaska.

406

458

234

Jurisdiction Maintenance

Other Edit Navigation Save

460

1. Select a state.

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

464

2. Select a jurisdiction.

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
COC	Cocorino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRF	Greenlee	1995	

466

Sub-Jurisdictions:

Juris Code	Juris Name

465

468

494

470

472

473

474

State: AZ

Rate Year: 0

Parent Juris Code:

Parcel Format:

Default Payee ID: ?

Payees

Show Templates

FIG. 24 Jurisdiction Set Up

476

486

406

452

456

482

490

478

480

492

Payees for MAR/AZ

Payee ID:  Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID: MCT Client Name: Maricopa County Tax Collector Client #: MCT Billing #: MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Notes:

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual: Referral Term:

FIG. 25 Jurisdiction Payee

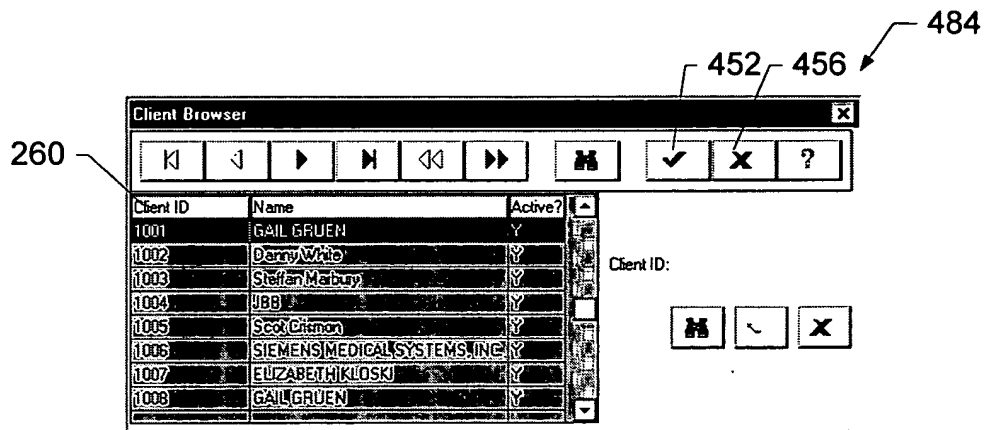


FIG. 26 Client Browser

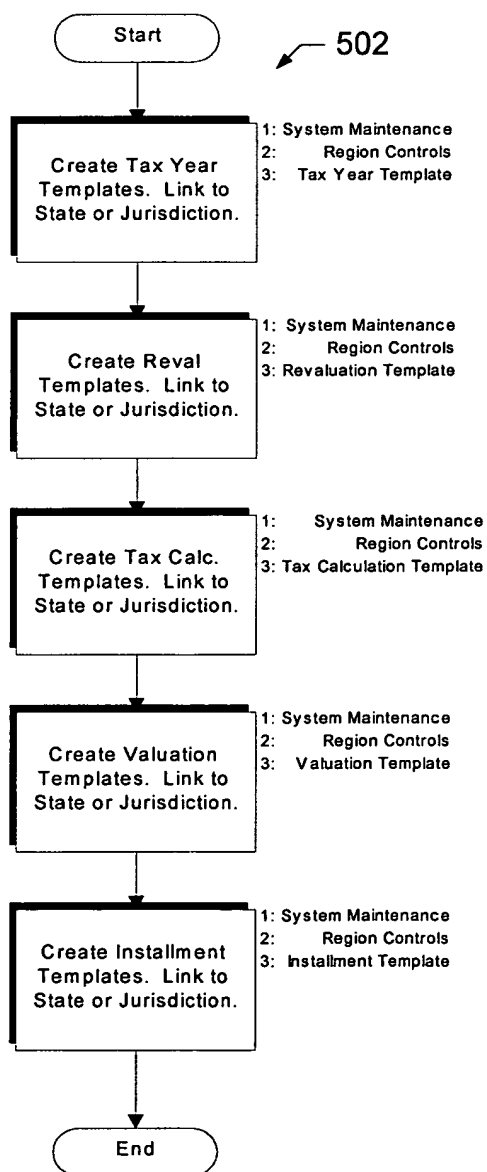


FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

FIG. 30 Templates by Year

536 534 542 538 544 540 532

533

Template Name: Arizona

Reval Cycle: 2 Apply

Move Back Move Forward

Potential Reval Years

1998  
1999  
2000  
2001  
2002

Years that are in bold and highlighted in blue are potential revaluation years.

☐ The parcels in this jurisdiction do not follow the same reval rules.

Links

514 546

FIG. 31 Revaluation Template

450 406 454 452 456 552

234

518 520 522 524 526

Template Name: Arizona

Show:

☒ Jurisdiction

☐ State

☐ System Master

☐ All

Link Type	Start Year	End Year	State	Jurisdiction Code
STATE	0000	9999	AZ	

554

528 523 521

☒ Jurisdiction ☐ State ☐ System Default

448

Start Year: 0000 End Year: 9999

State: Juris Cdt:

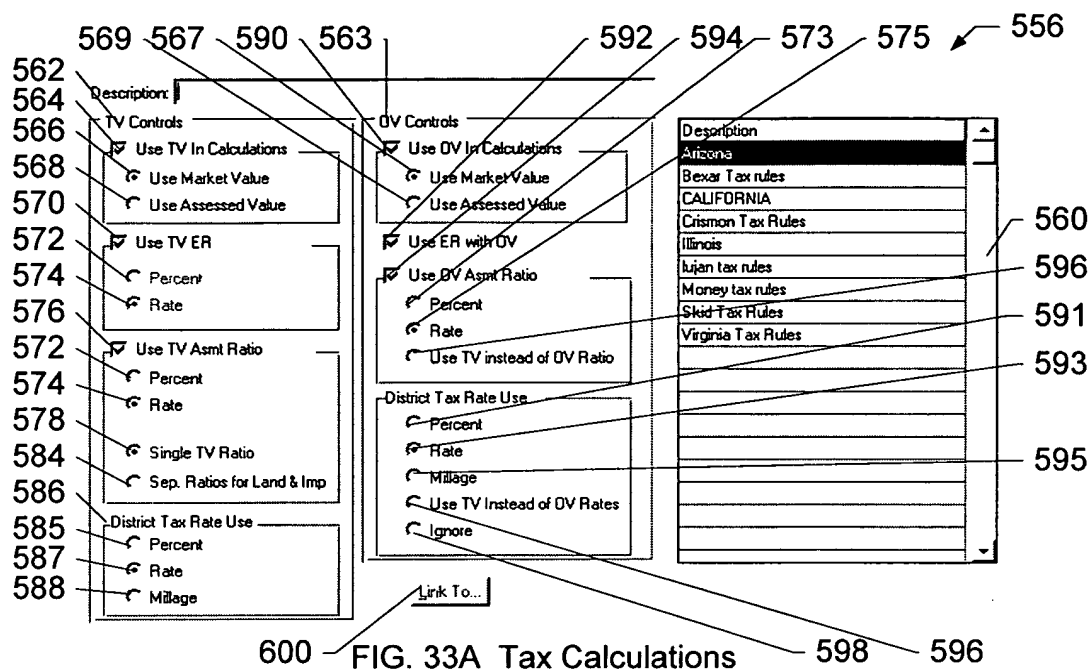
530

Status

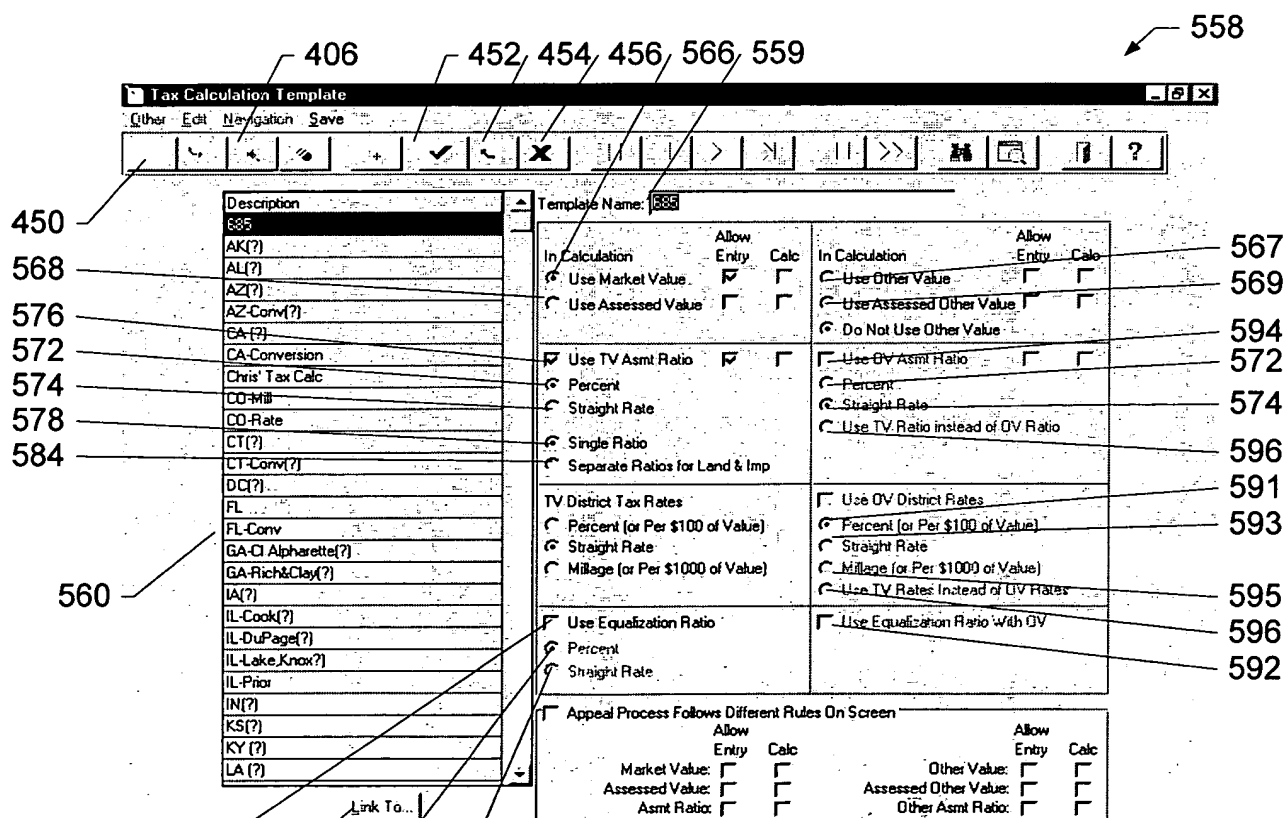
Link 'Arizona' to , up until present.

FIG. 32 Template Link To





### FIG. 33A Tax Calculations



### FIG. 33B Tax Calculations

406 454 452 456

602

450

518

520

522

524

526

528

523

521

604

448

554

606

530

FIG. 34 Tax Calculation Link To

630 622 624

406 452 456 450 406 454 452 456 626 628

608

616

450

614

618

610

612

634

640

600

658

660

662

664

666

668

670

630

678

620

632

650

646

648

642

676

672

674

FIG. 35 Installment Template

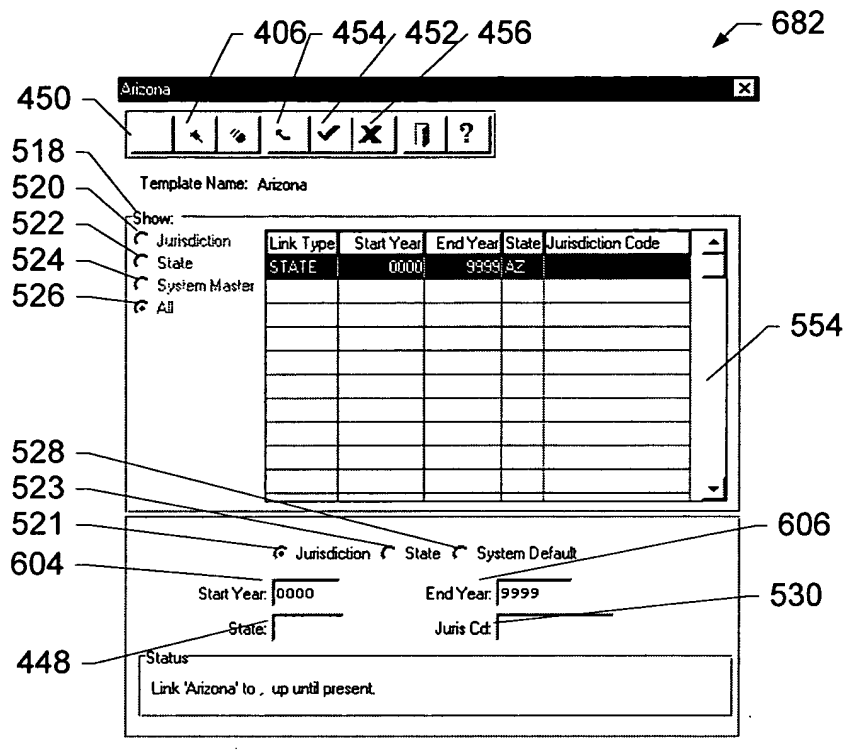


FIG. 36 Installment Templates Link To

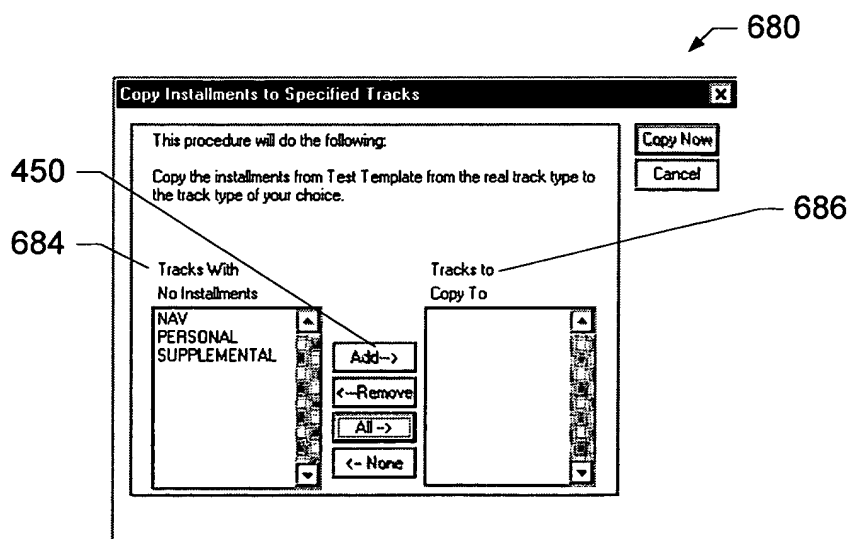


FIG. 37 Copy Installments Dialog Box

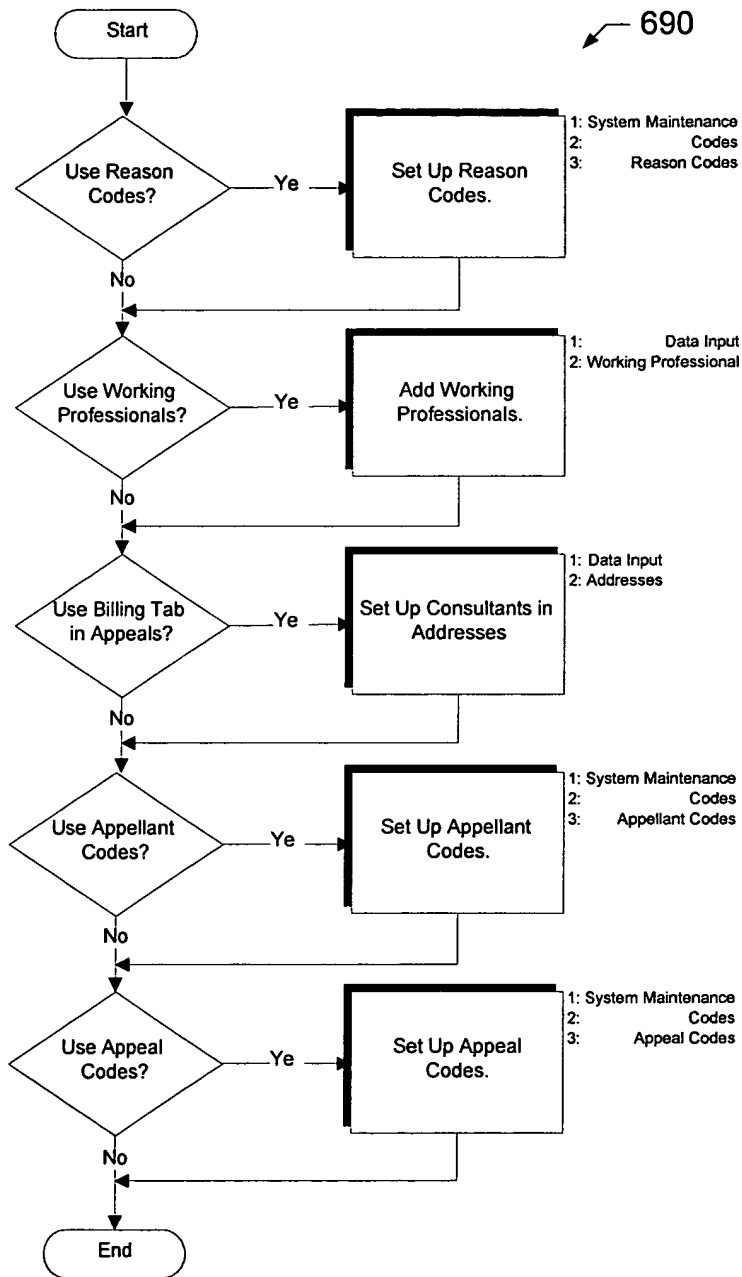


FIG. 38 Appeals Set Up

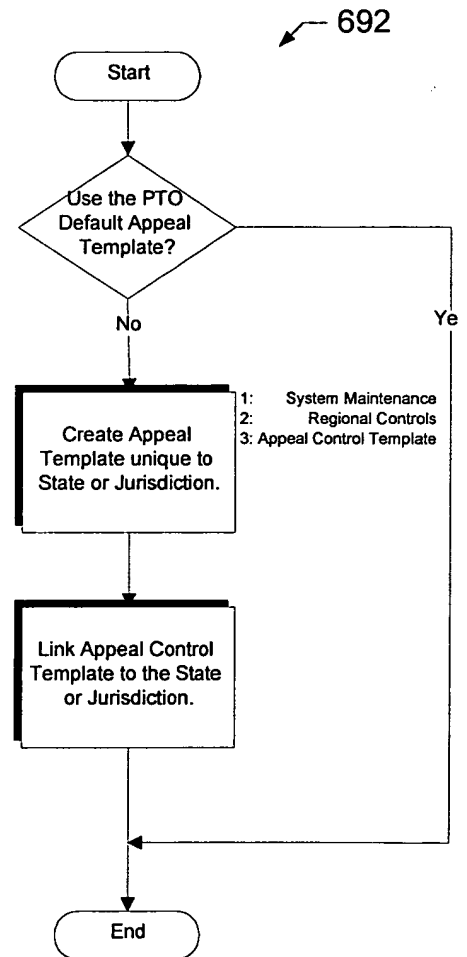


FIG. 39 Appeal Control

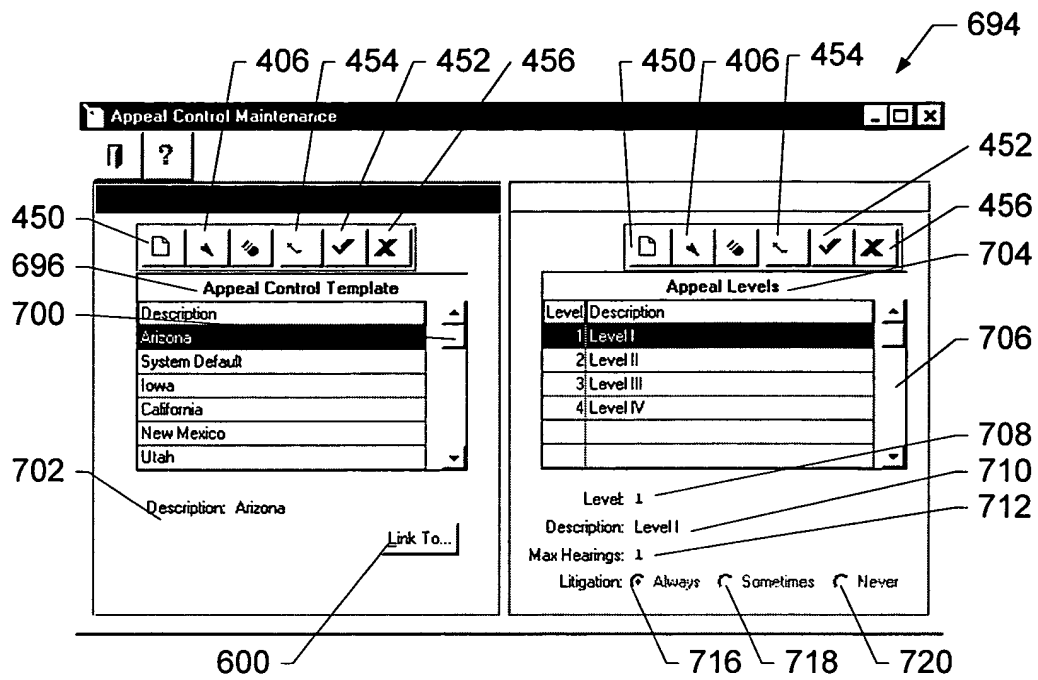


FIG. 40 Appeal Control

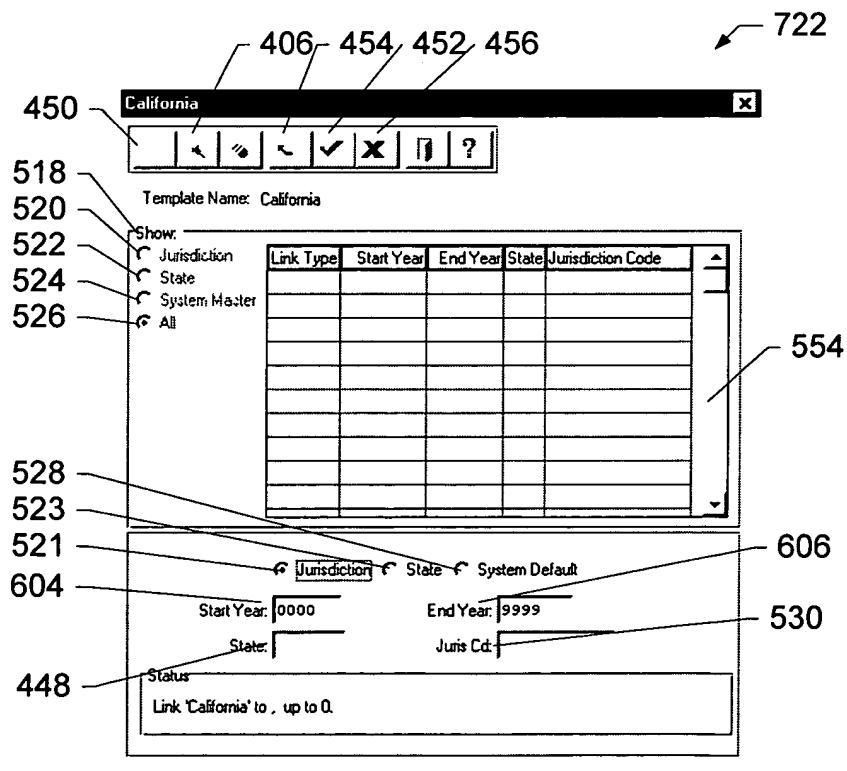
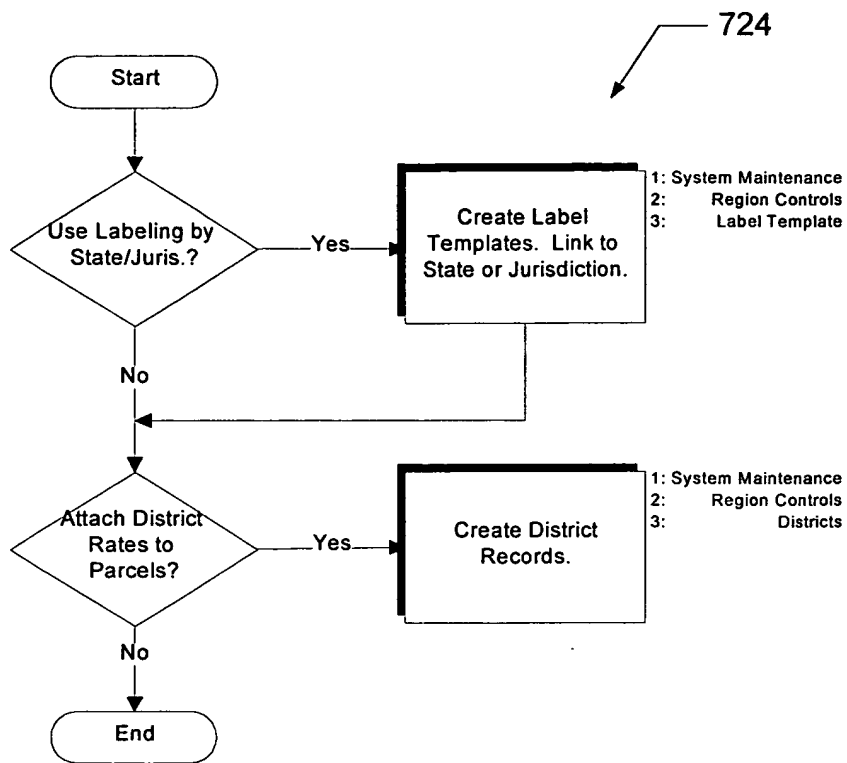
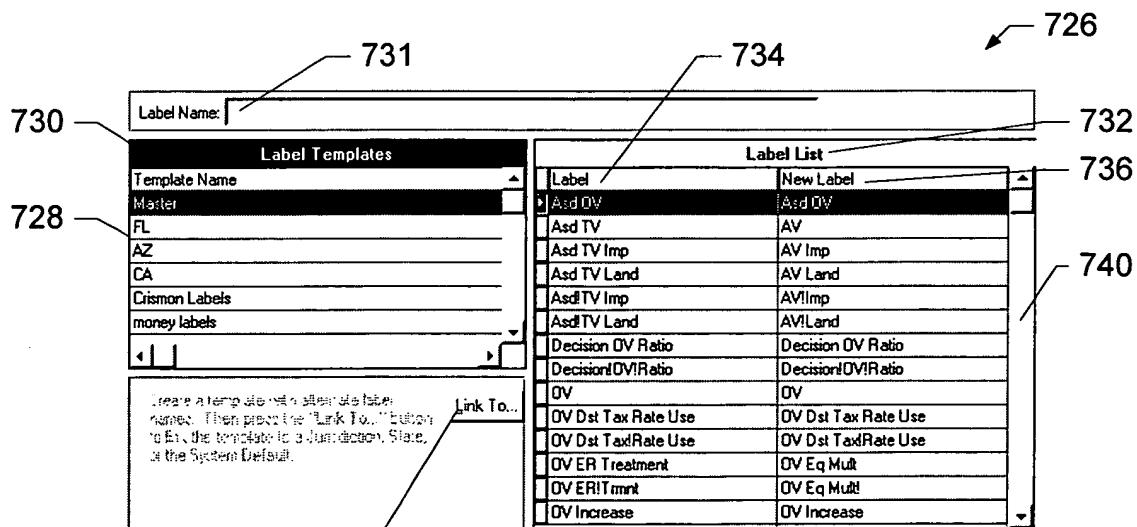


FIG. 41 Appeal Control Link

**THE** **WORLD'S** **LARGEST** **BOOKSTORE**



**FIG. 42 Dynamic Labeling and Districts**



600 — FIG. 43A Label Template

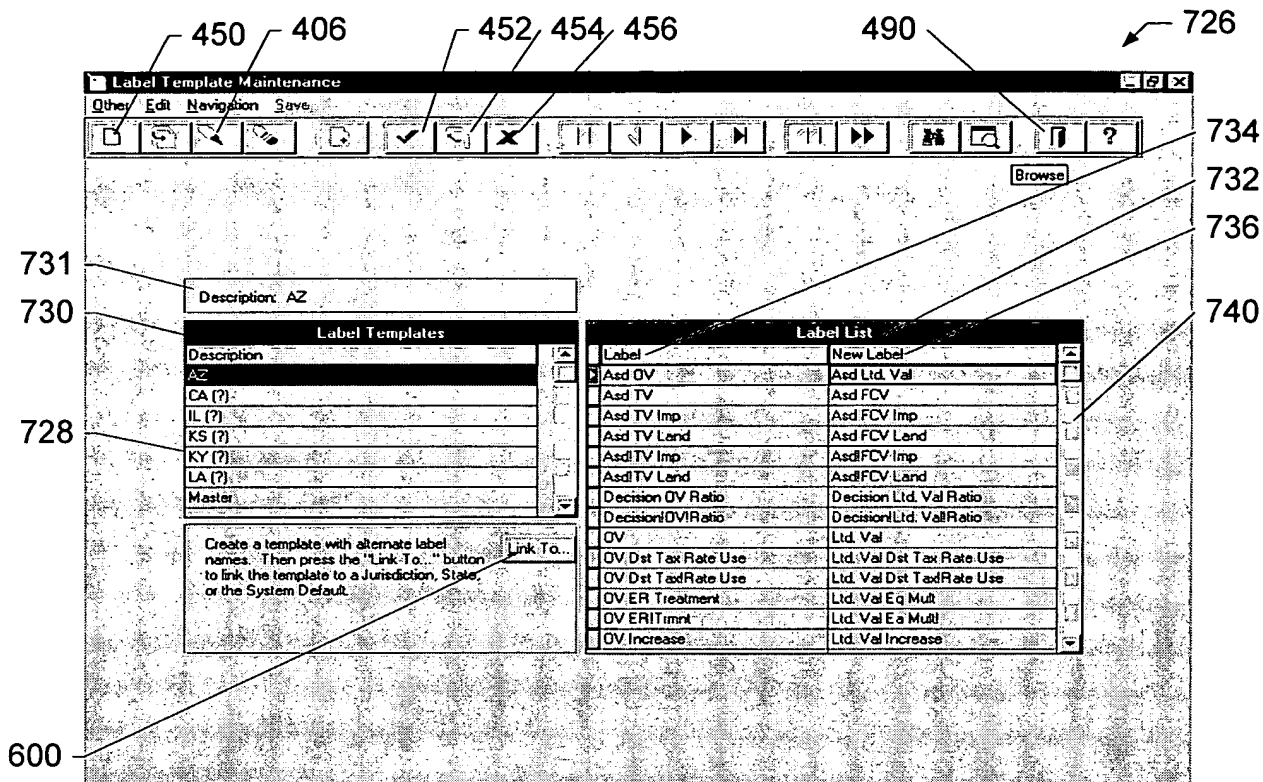


FIG. 43B Label Template

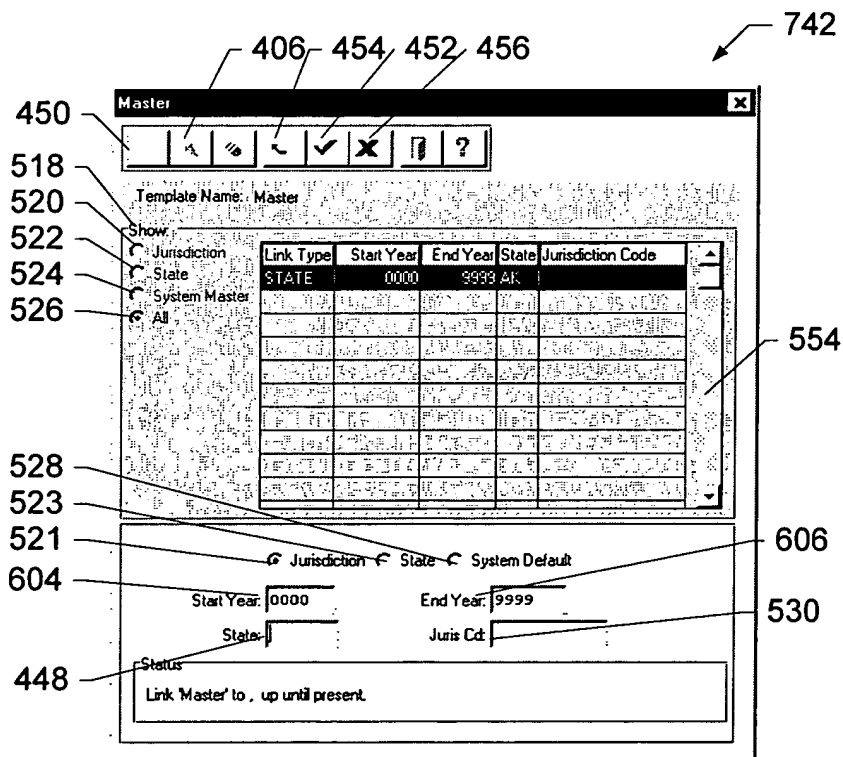


FIG. 44 Label Template Link To

Figure 744 is a screenshot of a computer screen displaying a data table and a form. The table at the top has four columns: Dist Code, Classification, TV Rate, and OV Rate. Below the table is a form with several input fields and checkboxes. Callout numbers 746 through 760 point to specific elements on the screen.

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

Below the table, there are three buttons: a grid icon, a curved arrow icon, and an 'X' icon. The form below these buttons contains the following fields:

- Dist Code: [text input field]
- Description: [text input field]
- Class: [text input field]
- TV Rate: [text input field with value 0.000000]
- OV Rate: [text input field with value 0.000000]
- ☐ Special District
- Type: [dropdown menu]
- Use in Update?: ☐ Y

Callout numbers and their corresponding elements:

- 746: Points to the Dist Code field in the form.
- 748: Points to the Description field in the form.
- 750: Points to the Class field in the form.
- 752: Points to the TV Rate field in the form.
- 754: Points to the OV Rate field in the form.
- 756: Points to the Special District checkbox in the form.
- 758: Points to the Type dropdown menu in the form.
- 760: Points to the Use in Update? checkbox in the form.

**FIG. 45 - District Set Up**

